

Joint CCA
Request for Proposals for
Joint CCA Integrated Resource Plan
Consulting Services
July 29, 2019



Project Overview

Clean Power Alliance (“CPA”), East Bay Community Energy (“EBCE”), Monterey Bay Community Power (“MBCP”), Peninsula Clean Energy (“PCE”), San Jose Clean Energy (“SJCE”), and Silicon Valley Clean Energy (“SVCE”, collectively, the “Joint CCAs”), are requesting proposals from qualified consultants or firms (“Consultant”) to provide Joint CCA Integrated Resource Plan (“IRP”) Technical Consulting Services for developing a Joint CCA IRP and then disaggregating the IRP into individual CCA IRPs (“IRP Technical Consulting Services”- Described below).

The Joint CCAs are seeking the Joint CCA IRP Technical Consulting Services to obtain economies of scale and to coordinate and optimize resource planning efforts by the Joint CCAs. This would be done by preparing two joint IRP plans: a conforming plan incorporating required CPUC assumptions and a preferred plan incorporating Joint CCAs’ agreed-upon assumptions that differ from those required by the CPUC. These two plans would then be disaggregated into proportional plans for each participating CCA, taking into account the contribution of each participating CCA to the collective demand, load, and already contracted-for resources, as well as individual CCA constraints. Our goal is to minimize planning inefficiencies, more efficiently and comprehensively plan for future resource needs, and ensure that our respective individual IRPs integrate well with other load-serving entity IRPs to collectively contribute to achieving state GHG and reliability goals.

The successful proposal submittal must demonstrate that the Consultant has the appropriate professional and technical background as well as access to adequate resources to fulfill the scope of work.

IRP Technical Consulting Services Scope of Work includes:

1. **Facilitate a one-day kickoff meeting followed by regular meetings** (weekly or at some other interval as appropriate) with the Joint CCAs to develop assumptions, goals, procurement preferences and plans, and desired sensitivity analyses that will guide creation of the Joint IRP.
2. **Identify, compile, and integrate inputs** needed to create a Joint IRP.
 - a. Identify necessary data and develop methods for integrating CCA inputs
 - b. Collect needed data from CCAs, included existing resources, contracted resources, and constraints and objectives for future procurement. Identify and facilitate consensus-building in areas where CCA inputs and/or constraints may be in conflict or beyond the capabilities of the modeling process
3. **Create Joint IRPs**
 - a. Forecast joint forward requirements for Conforming and Alternative portfolios, and select appropriate resources using RESOLVE modeling based on the goals and objectives of the Joint CCAs
 - b. Model the aggregated portfolio performance using SERVIM or other production cost software to establish cost performance, reliability, GHG emissions, and criteria pollutant emissions.
 - c. **Create Joint Conforming IRP** that is consistent with the CPUC reference case
 - i. Where necessary, assist Joint CCAs to agree on assumptions
 - ii. Using CPUC agreed-upon assumptions, CCA-specific data, and any other additional agreed-upon assumptions, undertake modeling to identify a joint

- plan with alternatives to allow each CCA to meet state law requirements and each CCA's GHG benchmark
 - iii. Work with CCAs to select an agreed-upon suite of additional resources that achieve the goals listed in ii.
 - d. **Create Joint Preferred IRP** which meets regulatory obligations in an optimal manner, subject to the constraints of CCA goals, policies, and preferences.
 - i. Where necessary, assist Joint CCAs to agree on assumptions around projected impact on load from initiatives such as energy efficiency, distributed generation, demand response and electrification, and realistic and acceptable alternatives that can be modeled to meet identified needs
 - ii. Using agreed upon assumptions, undertake modeling to identify alternatives to allow each CCA to meet state law requirements, each CCA's GHG benchmark and each CCA's additional internal goals
 - iii. Work with Joint CCAs to select an agreed upon suite of additional resources that achieve the goals listed in ii.
- 4. **Create an Excel report outlining the performance of the joint IRPs** with respect to cost, reliability, GHG emissions and local pollution impacts, including the following:
 - a. Long-term Conforming IRP (2020-2030)
 - b. Alternative IRP utilizing DG/EV/DER assumptions
 - c. Rate results
 - d. GHG emissions
 - e. Reliability/ renewable integration needs
 - f. Assumptions data
 - g. Dashboard enabling sensitivity analysis
- 5. **Create a report** in PowerPoint format describing:
 - a. Joint IRP modeling techniques, assumptions, and goal refinement and recommended procurement results
 - b. Rate, GHG, reliability, and criteria pollutant results
- 6. **Participate in external stakeholder meetings** and provide iterations to Joint IRP models
- 7. **Create a disaggregated individual CCA IRP Excel spreadsheet** for each participating CCA, based on the Joint IRP, for both the conforming and alternative versions
- 8. **Create individual CCA reports** in PowerPoint format describing individual CCA recommended procurement results

Fee Schedule

- Consultant should propose to the Joint CCAs a project fixed fee proposal for two (2) scenarios:
 - I. Joint Integrated Resources Conforming Portfolio Plan Development
 - II. Joint Integrated Resources Alternative Portfolio Plan Development, including accounting for DG/EV/DERs on the programmatic side
- Consultant should propose to the Joint CCAs a project fixed fee proposal per CCA for disaggregating the Joint Conforming IRP and Joint Alternative IRP into individual CCA IRPs.
- Consultant should propose (or specify extent of ability to provide) a time and materials and/or a fixed fee option for development of individual IRPs to enable any individual member(s) of the Joint CCAs to develop their conforming portfolio and/or preferred portfolio(s) independently.

Proposal Requirements

In order to be considered, all proposals must be submitted by the deadlines listed in the RFP schedule included herein. When completing the Consultant's RFP response, Consultant must include the following detail:

- Background and Experience
- Understanding of California CCAs
- Understanding of CPUC-jurisdictional load-serving entity IRP requirements
- Specific experience developing IRPs for CPUC-jurisdictional entities, for CA non-CPUC jurisdictional entities, and for non-CA entities and familiarity with CPUC IRP tools
- Develop a process to deliver the scope of work
 - The scope of work represents the Joint CCAs' idea of how the Joint CCA IRP Technical Consulting Services would work. In your own words, please describe the process you would use when delivering this service. Please describe your approach to:
 - Initially aggregating the needs of the individual CCAs
 - Understanding individual CCA values and incorporating those values into the joint model
 - Accounting for individual CCA loads and load profiles in joint IRP
 - Incorporating individual CCA resources and commitments into joint IRP
 - Assembling information from each CCA including which information is needed
 - Selecting an appropriate model and conducting modeling - if using proprietary model(s), please provide sufficient detail as to how it compares with the functionality of the other models, especially those used by the CPUC
 - Optimizing resource attributes and values
 - Engaging external stakeholders
 - Accommodating centrally-mandated or IOU-mandated procurement on behalf of all customers
 - Developing a preferred IRP
 - Disaggregating the Joint IRP into individual CCA IRPs
 - Participating in CPUC discussions about statewide IRP needs and modeling
 - Updating Joint IRP to account for changes to CPUC 2019 reference system plan
- Describe how the Consultant will adhere to anti-trust and collusion laws while providing this service to the Joint CCAs
- Describe how the Consultant will avoid conflicts of interest with other power providers and/or regulatory bodies while providing this service to the Joint CCAs
- Name, position, and short biography of employee(s) responsible for providing this Service
- Three references
- Fee schedule

Evaluation of Proposals

The Joint CCAs will evaluate all proposals based on the following criteria:

- Experience developing IRPs, particularly for California CPUC-jurisdictional entities
- Experience using RESOLVE, SERVM, and PLEXOS models

- Access to proprietary models that supersede the capabilities of RESOLVE, SERVM, and/or PLEXOS
- Process, methods, and schedule used to develop IRPs
- Fee Schedule

The Joint CCAs may, or may not, negotiate contract terms with selected Consultant(s) prior to award, and expressly reserve the right to negotiate with several Consultants simultaneously and, thereafter, to award a contract to the Consultant(s) offering the most favorable terms to the Joint CCAs. Proposals submitted, therefore, should contain the Consultant’s most favorable terms and conditions, as the selection and tentative award may be made without further discussion with any Consultant.

The Joint CCAs reserve the right to accept or reject any and all submitted proposals, to waive minor irregularities, modify services, and to request additional information or revisions to offers, and to negotiate with any or all Consultants at any stage of the evaluation.

RFP Timeline

Consultants must submit one (1) electronic copy of the proposal **by August 12, 2019, at 5:00 p.m. Pacific Daylight Time**. Proposals must be emailed to irp-rfp@ebce.org with the subject line: “Joint CCA IRP Consulting Services”.

Any proposal received after the due date and time will be rejected. The due date is subject to change. If the due date is changed, all known recipients of the original RFP will be notified, in writing, of the new date and notice will be posted to our website at least three days before the revised due date.

Questions about the RFP must be submitted by email only to the following email address: jeanne.sole@sanjoseca.gov. Questions will not be accepted by phone. Responses to any questions will be made available in writing, online (<https://ebce.org/solicitations/>), and by email to all parties who have notified the Joint CCAs of an interest in responding to the RFP. Deadline to submit questions is August 5, 2019 at 5:00 p.m. Pacific Time. All potential Consultants are responsible for checking the website for any addenda or written responses to questions received. Potential Consultants may only rely on written responses to questions; no oral representations shall be binding on the Joint CCAs.

Selection Timeline:	
<i>Action</i>	<i>Date</i>
Issuance of RFP	July 29, 2019
Deadline to submit questions	August 5, 2019
Deadline to submit proposals	August 12, 2019
Proposal evaluation	August 13-16, 2019
Finalist selection/interviews if needed	August 19-21, 2019
Award of agreement	August 28, 2019

Desired Project Timeline:	
<i>Action</i>	<i>Date</i>
Formulate Joint Conforming and Alternate IRPs	Aug 29 through end-Oct, 2019
Adjust with external stakeholders	Oct 1 through end-Nov, 2019
True-up with CPUC 2019 reference system plan	December, 2019

Disaggregate into individual IRPs	Jan 2 through end-Mar 2020
Finalize IRP submissions	Before May 1, 2020

Joint CCA Legal Obligations

The Joint CCAs are not obligated to respond to any proposal submitted as part of the RFP.

The Parties acknowledge that the Joint CCAs are public agencies subject to the requirements of the California Public Records Act set forth at Cal. Gov. Code section 6250 et seq. The Joint CCAs acknowledge that a Consultant may submit information to the Joint CCAs that the Consultant considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255).

Any page of the proposal package that is deemed by Consultant to be confidential or contain trade secrets by the Consultant shall be clearly marked “CONFIDENTIAL INFORMATION” or “PROPRIETARY INFORMATION” at the top of the page. The Joint CCAs will not disclose confidential or proprietary information to third parties, unless required by law; however, the Joint CCAs cannot guarantee that such information will be held confidential.

Upon request or demand of a member of the public for production, inspection and/or copying of information designated by a Consultant as “CONFIDENTIAL INFORMATION” or “PROPRIETARY INFORMATION”, the Joint CCAs as soon as practical but within three (3) business days of receipt of the request, shall notify the Consultant that such request has been made. The Consultant shall be solely responsible for seeking an appropriate court order or injunction prohibiting disclosure of the information to the public. Consultant shall defend, indemnify, and hold the Joint CCAs harmless from all claims, actions, liabilities, and losses arising from any third-party challenge to the withholding of information from public disclosure. If the Consultant takes no such action to seek an appropriate court order or injunction, within fifteen (15) days after receiving the foregoing notice from the Joint CCAs (or refuses to execute an indemnity agreement in a form acceptable to the Joint CCAs), the Joint CCAs shall be permitted to comply with the request for public disclosure demand and are not required to defend against it.

No proposal shall be binding upon the Joint CCAs except pursuant to a written agreement signed by the Joint CCAs and the Consultant. The Joint CCAs will not be liable at any time for any costs the Consultant may incur in preparing or submitting its response to this RFP.

Proposals submitted in response to this RFP are public documents. With the exception of any Confidential Information that is legally exempt from disclosure, the Joint CCAs are obligated to disclose such proposals if requested (including by competitors). The Joint CCAs will also disclose any winning proposal at a public meeting of any or all of the Joint CCAs’ Boards of Directors.